

## Chapter 3 - Probate Party - PTY

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## Probate Party Screen

The party screen is used to add information about the juvenile. Users must have security to be able to update case information.

### Accessing the Party Screen:

```
NXT TRAN  P  HDR  TYPE ADD  CASE NBR  20025555  REC NBR__
```

From the Next Tran Line, enter PTY in the Next Tran field and the option that you want to perform (ADD, INQ, MOD, DEL) along with the case number. Press <Enter> and the system will display the header screen.

The screenshot displays the 'PARTY ADD' screen with the following fields and values:

- CASE#**: 00333325 **TYPE**: DA **XREF #**: **TYPE**: **JUDGE**: 11953 **DATE**: 8/02/2000
- NAME**: TEST, DACASESUM, **SSNO**: 000000000 **OPTIONAL DATE**:
- STATUS**: 0 CLOSED **REOPEN**: **ATTNY**: **PUBLIC**: P
- MICRO**: **DISPO**: 12/31/2001 **CODE**: GTD **ORIG PR**: 8/02/2000 **1**

Below the header, there are sections for:

- Qualification Key**: Fields for DATE and DUE DATE.
- Party Activity Key**: Fields for DATE.
- Court Activity Key**: Fields for DATE.
- GDNSHIP REVIEW TYPE**: Fields for DATE.
- Event Comment**: Text field.
- Inventory Amt**: Text field.
- Date Paid**: Text field.
- Fee**: Text field.
- Receipt #**: Text field.
- Micro#**: Text field.
- Calc Dt**: Text field.
- Name**: Text field.
- Address**: Text field.
- City**: Text field.
- ST**: Text field.
- ZIP**: Text field.
- Phone**: Text field.
- ATTNY**: Text field.
- SURETY**: Text field.

At the bottom, there is a navigation bar with the following text:

```
NXT TRAN  P  PTY  TYPE  ADD  CASE NBR  00333325  REC NBR  __
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup
F13=Notes F14=Dockets F16=Inv/Date F17=INV. Receipts
```

The bottom status bar shows '07/011' and 'Connected to remote server/host OSMSOUTH using port 23'.

Following are the field descriptions for the Party Screen.

**~#~**

This area displays the party number assigned by the system.

**~DESC~**

This is a required field. The description specifies the role of the individual within this case. Prompt <F4> for a list of valid party descriptions.

**~Qualification Key~**

Enter the qualification key. Either BND - Bond or AOT - Acceptance of Trust.

**~Qualification Date~**

Enter the date that this party qualified. This date will be used to calculate due dates for reports and accountings.

**~Due Date~**

This date specifies the follow up date. This date may be changed once during the administration of the estate. If this field is left blank when adding a party, the qualification date will be used.

**~Party Activity Key~**

This code identifies the last action taken by this party. Prompt <F4> for a list of valid party action codes. A schedule record will be created for every party activity. This field can be updated from the schedule screen by selecting a party number.

**~Party Activity Date~**

This is the date that corresponds with the last party action code.

**~Court Activity Key~**

This code identifies the last action taken by the court against this party. Prompt <F4> for a list of valid court action codes. A schedule record will be created for every party activity. This field can be updated from the schedule screen by selecting a party number for the event.

**~Court Activity Date~**

This is the date that corresponds with the last court action code.

**~Guardianship Review Type~**

This code specifies that the guardianship has been reviewed. The valid codes are RRM - Review of Minor Guardianship and RRG - Review of LIP Guardianship. A schedule record will be created for every guardianship review. The header screen will display information on the last guardianship review that was received and when the next review will be due.

**~Guardianship Review Date~**

This is the date that the guardianship was reviewed.

**~Event Comment~**

Enter comments that will be displayed on the schedule screen for the entry. If this field is left blank, the system will add the comment from the code table.

**~Microfilm Number~**

Enter the microfilm number for this event.

**~Inventory Amount~**

Enter the amount of the inventory in this field for deceased estates. When an amount is entered in this field, the date that is entered will be used to write an event of IFC - Inventory fee calculated to the schedule screen and update the party activity fields if the date of the inventory fee calc is greater than the date of the current party action.

**~Fee~**

The system will calculate the inventory fee based on the entry made in the inventory amount field.

**~Calculation Date~**

Enter the date the Inventory amount was calculated. If a date is entered into this field, the system will calculate the inventory even if there is no amount in the Inventory amount field.

**~Date Paid~**

Enter the date that the inventory fee was paid. The system will write an event of IFP - Inventory Fee Paid to the schedule screen and update the party activity fields if the date the inventory fee was paid is greater than the date of the current party action.

**~Receipt~**

Enter the receipt number for the inventory fee payment.

**~Name~**

Enter the name of the fiduciary into this field. Follow the name procedure as explained in Chapter 1.

**~Address, City, State, Zip, Telephone~**

Enter the address and telephone number of this fiduciary.

**~Attorney~**

Enter the attorneys bar number that is representing this party. Press <F4> for a list of attorneys.

**~Surety~**

Enter the surety company for this party. Press <F4> for a list of sureties.

## Adding or Modifying a Party

From the Next Tran Line, enter the following:

### Adding:

NXT TRAN	P	PTY	TYPE	ADD	CASE NBR	20035555	REC NBR	___
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### Modifying:

NXT TRAN	P	PTY	TYPE	MOD	CASE NBR	20035555	REC NBR	___
----------	---	-----	------	-----	----------	----------	---------	-----

When all information has been added, press <Enter> and the system will display the screen you have requested.

PARTY ADD

CASE# 00333325 TYPE DA XREF # TYPE JUDGE 11953 DATE 8/02/2000

NAME TEST, DACASESUM, SSNO 000000000 OPTIONAL DATE

STATUS 0 CLOSED REOPEN ATTN PUBLIC P

MICRO DISPO 12/31/2001 CODE GTD ORIG PR 8/02/2000 1

=====

# 5 DESC QUALIFICATION KEY DATE DUE DATE

PARTY ACTIVITY KEY DATE

COURT ACTIVITY KEY DATE

GDNSHIP REVIEW TYPE DATE

EVENT COMMENT MICRO#

INVENTORY AMT FEE CALC DT

DATE PAID RECEIPT #

NAME

ADDRESS

CITY ST ZIP

PHONE

ATTNY SURETY

NXT TRAN P PTY TYPE ADD CASE NBR 00333325 REC NBR

F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help

F13=Notes F14=Dockets F16=Inv/Date F17=INV. Receipts

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Enter all information regarding the party and press <Enter>. The system will save the party.

## Inquiring on a Party

There are two inquiry screens for parties:

1. Inquiring on all parties - This screen will list all parties for the case and limited information regarding each of them.
2. Inquiring on a single party - This screen will display the actual party screen for each individual party. All information from the party screen will be displayed on this screen. You must enter the party number that you want to inquire on in the REC NBR field for the party to be displayed.

Following are examples of both party inquiry screens.

### All Party Inquiry:

From the Next Tran Line, enter PTY/INQ in the Next tran and type field along with the case number.

NXT TRAN P PTY TYPE INQ CASE NBR 00333325 REC NBR    

Press <Enter> and the system will display the following screen.

**PARTY INQ**

CASE# 00333325 TYPE DA XREF #     TYPE     JUDGE 11953 DATE 8/02/2000  
NAME TEST, DACASESUM, SSNO 000000000 OPTIONAL DATE      
STATUS 0 CLOSED     REOPEN     ATTN     PUBLIC P  
MICRO     DISPO 12/31/2001 CODE GTD ORIG PR 8/02/2000 1

NUM	DESC	QUALIFICATION	DUE DATE	PARTY ACTIVITY	COURT ACTIVITY	SURETY
1	CSI	AOT	8/02/2000	8/02/2000	ACC	8/15/2002
	PARTY, DACASESUM, ADDRESS CITY MI 88888					
2	SPT	AOT	8/02/2000	8/02/2000		
	PARTY TWO,,					

More...

NXT TRAN P PTY TYPE INQ CASE NBR 00333325 REC NBR      
F3=Exit F6=System F8=Juvenile F9=Name Lookup F13=Notes F14=Dockets F16=Inv/Date

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## Single Party Inquiry:

From the Next Tran Line, enter PTY/INQ in the Next tran and type field along with the case number and the individual party number.

```
NXT TRAN  P  PTY  TYPE  INQ  CASE NBR  00333325  REC NBR  __
```

Press <Enter> and the system will display the following screen.

PARTY INQ											
CASE#	00333325	TYPE	DA	XREF #		TYPE		JUDGE	11953	DATE	8/02/2000
NAME	TEST, DACASESUM,					SSNO	000000000	OPTIONAL	DATE		
STATUS	0	CLOSED		REOPEN		ATTNY				PUBLIC	P
MICRO		DISPO	12/31/2001	CODE	GTD	ORIG PR	8/02/2000		1		
=====											
#	1	DESC	CSI	QUALIFICATION KEY	AOT	DATE	8022000	DUE DATE	8022000		
				PARTY ACTIVITY KEY	ACC	DATE	8152002				
				COURT ACTIVITY KEY		DATE					
				GDNSHIP REVIEW TYPE		DATE					
=====											
EVENT COMMENT								MICRO#			
INVENTORY AMT								FEE		CALC DT	
DATE PAID								RECEIPT #			
=====											
NAME	PARTY, DACASESUM,										
ADDRESS	ADDRESS										
CITY	CITY				ST	MI	ZIP	88888			
PHONE											
ATTNY	SURETY										
=====											
NXT TRAN	P	PTY	TYPE	INQ	CASE NBR	00333325	REC NBR				
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup											
F13=Notes F14=Dockets F16=Inv/Date F17=INV. Receipts											
=====											
										22/013	
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\\SCAO\1N54QLS on Ne05:											

## Deleting a Case

From the Next Tran Line enter the following information:

NXT TRAN P PTY TYPE DEL CASE NBR 20035555 REC NBR    

When all information has been added, press <Enter> and the system will delete the requested party.

USER: P44ANGIE      TRANSACTION REQUEST SCREEN      RELEASE: 05/2003

<b>Probate Transactions</b>	<b>Receivable Transactions</b>	<b>Vendor Transactions</b>
HDR - Case Header	ARM - Master Inquire	APD - Other Vendor Maint.
PTY - Party	ARU - Master Maintenance	APA - Attny Vendor Maint.
SCH - Schedule	CHK - Master Payment Inq	APF - Facil Vendor Maint.
SUM - Summary	LUP - Receipt Inquiry/Void	APV - Voucher Processing
MED - Mediation	ARP - Receive Payments	API - Voucher Inquiry
FRD - Financial Order	ADJ - Adjustment	APP - Voucher Payments
DOC - Documents	CRM - Credit Memo	APJ - Voucher Adjustments
		<b>Accounting Transactions</b>
		ACT - Account Maintenance
		BMT - Budget Maintenance
		BIQ - Budget Inquiry
		PRM - Price File Maint.
	<b>Adoption Transactions</b>	<b>Other Options</b>
<b>Reports</b>	ADC - Adoption Case Header	REL - Release Information
RPT/PRO - Probate	ADP - Adoption Party	CNI - Central Name Index
RPT/FIN - Financial	ADE - Adoption Event	CPI - Cir/Pro Name Index
RPT/ADP - Adoption	ADS - Adoption Case Summary	CCL - Central Calendar
	ADF - Adoption Forms	

NXT TRAN P PTY TYPE DEL CASE NBR 00333325 REC NBR 1

F3=Exit    F5=Setup    F6=System Commands    F8=Juvenile    F9=Name Lookup  
 F10=Name Update    F14=Docket Request    F16=Inv/Date    F20=File Maintenance    Help

Record(s) deleted successfully ←

MP b      21/013  
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The system will automatically delete the records.



## Inventory Fee Calculation

From the Next Tran Line, enter the following information.

NXT	TRAN	P	PTY	TYPE	MOD	CASE NBR	20035555	REC NBR	01
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When all information has been added, press <Enter> and the system will display the screen you requested.

PARTY MOD											
CASE#	00333325	TYPE	DA	XREF #		TYPE		JUDGE	11953	DATE	8/02/2000
NAME	TEST, DACASESUM,				SSNO	000000000	OPTIONAL	DATE			
STATUS	0	CLOSED		REOPEN		ATTNY				PUBLIC	P
MICRO		DISPO	12/31/2001	CODE	GTD	ORIG PR	8/02/2000		2		
=====											
#	2	DESC	SPT	QUALIFICATION KEY	AOT	DATE	8022000	DUE DATE	8022000		
				PARTY ACTIVITY KEY		DATE					
				COURT ACTIVITY KEY		DATE					
				GDNSHIP REVIEW TYPE		DATE					
=====											
EVENT COMMENT								MICRO#			
INVENTORY AMT				50000.00	FEE		CALC DT	08032003			
DATE PAID					RECEIPT #						
=====											
NAME	PARTY TWO,,										
ADDRESS											
CITY					ST		ZIP				
PHONE											
ATTNY					SURETY						
=====											
NXT TRAN	P	PTY	TYPE	MOD	CASE NBR	00333325	REC NBR				
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup											
F13=Notes F14=Dockets F16=Inv/Date F17=INV. Receipts											

1. Enter the amount of the inventory in the “Inventory Amt” field.
2. Enter the date that you are calculating the inventory for in the “Calc Dt” field.

Press <Enter>. The system will calculate the inventory and display the fee in the “Fee” field.

When an inventory fee is calculated the following entries are made.

1. An event of IFC - Inventory Fee Calculated is added to the Schedule.
2. If the inventory fee calculation date is greater than the existing party action date the system will overlay the information with the IFC and the date that it was calculated.

**NOTE:** If the Inventory Amt is blank or 0.00 the system will calculate the fee as \$5.00.

## Inventory Fee Paid

From the Next Tran Line, enter the following information.

NXT	TRAN	P	<u>PTY</u>	TYPE	<u>MOD</u>	CASE NBR	<u>20035555</u>	REC NBR	<u>01</u>
-----	------	---	------------	------	------------	----------	-----------------	---------	-----------

When all information has been added, press <Enter> and the system will display the screen you requested.

```

PARTY MOD
CASE# 00333305 TYPE DE XREF # TYPE JUDGE 11953 DATE 7/19/2000
NAME CASE,TEST,24 SSNO 000000000 OPTIONAL DATE
STATUS 0 CLOSED REOPEN ATTN PUBLIC P
MICRO DISPO 12/31/2001 CODE GTD ORIG PR 7/19/2000 1
=====
# 1 DESC IPI QUALIFICATION KEY AOT DATE 7192000 DUE DATE 7192000
PARTY ACTIVITY KEY IFC DATE 8012003
COURT ACTIVITY KEY DATE
GDNSHIP REVIEW TYPE DATE
=====
EVENT COMMENT MICRO#
INVENTORY AMT 65,250.00 FEE 275.63 CALC DT 8012003
DATE PAID 08052003 RECEIPT # 12345
=====
NAME CASE,TEST,24
ADDRESS 24 TEST STREET
CITY TEST CITY ST MI ZIP 48500
PHONE
ATTN SURETY
=====
NXT TRAN P PTY TYPE MOD CASE NBR 00333305 REC NBR
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help
F13=Notes F14=Dockets F16=Inv/Date F17=INV. Receipts
=====

```

1. Enter the date of the payment in the “Date Paid” field.
2. Enter the receipt number for the payment in the “Receipt #” field.

Press <Enter>. The system will save the Inventory payment information.

When an inventory fee is paid, the following entries are made.

1. An event of IFP - Inventory Fee Payment is added to the Schedule.
2. If the inventory fee payment date is greater than the existing party action date the system will overlay the information with the IFP and the date that it was paid.